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COVERING THE TOTAL FOODSERVICE INDUSTRY

JUNE 13, 1990

RESTAURANTS & INSTITUTIONS

Sure-Fire Promotions

Chains Take Aim On Euromarket

BREAKFAST SPECIAL: TRENDS, SYSTEMS, MENUS, RECIPES

Balanced Breakfast: ◁ Denver-Style

FRESH IDEAS FOR FRESH PRODUCE

More Inside! See Page 2

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JUNE 13, 1990

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Whether the purpose is to advertise a special event, announce the opening of a new foodservice unit or to break the monotony of day-to-day service, a promotion provides a great outlet for creativity. We present a selection of promos that have performed as promised and paid off for patron and operator.

74 EYE-OPENING BREAKFAST MENUS AND OTHER IDEAS

Ever since McDonald's introduced breakfast to keep the real estate working, and health-conscious joggers and workers sought foods to build better bodies, operators have been looking for eye-opening morning ideas. For the first time, *R&I* presents ethnic breakfasts . . . Italian, Japanese and Swiss early-bird favorites.

114 AMERICAN CHAINS FIND EUROPE THE WAY TO GO

No innocents abroad are the American quick-service chains. They are getting deeper into the fast-food export business. The ultra-competitive domestic market gives chains serious reason for expanding into Europe. Trade barriers are coming down, *perestroika* has opened some doors and a large population is hungering for fun food.

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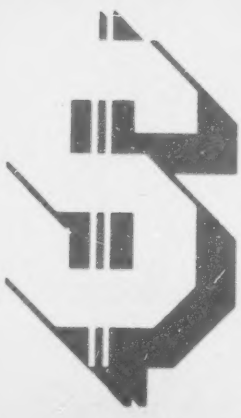

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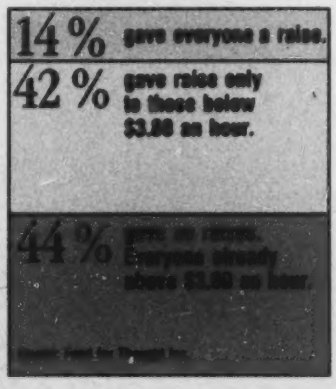

PERCENTAGE RAISING MENU PRICES AS A RESULT OF MINIMUM-WAGE HIKE

Full service	26%
Business & industry	20
Fast food	12
Schools	10
Other	6

Source: Food for Thought Inc.

■ **READER'S OPINION**

Say Goodbye to $3 Lunch

In an effort to increase the standard of living for the working poor, the government has raised the minimum wage to $3.80 an hour.

The increase will be dramatic in its immediate impact upon marginal industries such as foodservice.

A survey of 50 foodservice employers revealed some interesting trends. Of the 19,029 employees surveyed, 35% were considered full time, working more than 32 hours per week. The remaining 65% were part-time employees, some working as little as 10 to 12 hours per week. The fast-food industry employed 68% of the labor; full-service restaurants 20%.

When employers were asked if they were forced to raise wages for *all* hourly employees because of the increase in minimum wage, 44% said no because all of their employees were currently earning more than $3.80 per hour. Another 42% responded no, saying only those employees earning below $3.80 would be given a raise. Only 14% indicated they would increase the hourly rate of all employees, but said it would not be an equal amount across the board. (See chart in wing.)

The fast-food industry and schools were the only segments to indicate they were not going to reduce full-time positions available to decrease labor expenses—probably because these employers already utilize 72% part-time labor. The remaining foodservice employers, however, have 62% full-time staffs, which require vacation time, sick days, uniforms and insurance. Of these, only three indicated they would reduce full-time employment positions.

How will foodservice establishments recover from the wage increases? Three quarters of the respondents said they were either about to raise their menu prices or had just done so within the last few weeks. (See table in wing.)

The increase of 45 cents per hour is a positive step toward bringing many workers out of the poverty level. But what about the nearly 50% of foodservice employees who did not get a pay raise? What will happen to the purchasing power of employees who, over the last four years, have earned annual and merit increases and are currently making $4 to $4.25 per hour?

Assuming they work full time, employees who earn $3.35 per hour ostensibly get a $968 raise this year because of the increased minimum wage. While it was necessary and long overdue, by helping the $6,700 income bracket, we are hurting the $7,900 ($3.80 an hour) to $8,840 ($4.25 an hour) income-level employee.

For example, if the cost of a typical fast-food lunch is $3.64 with tax in the Midwest, the cost of that lunch will rise at least 12% in restaurants without benefit packages or 18% in restaurants whose employees have minimal benefits. If the cost of the food, packaging and profit all remain the same, the lunch will now cost $4.08 to $4.28. For employees earning $4.25 per hour, this meal used to represent 2.9% of his take-home pay per week. Now it represents 3.3% and he has lost .4% of his purchasing power.

Have we really helped by increasing the minimum wage? Or have we simply enlarged the poverty level by achieving parity and combining the bottom two income segments of society? Of course, the foodservice industry cannot afford to give all employees an 11.8% raise. The effects would be nullified by the inflation in other markets. But, to what lengths will this increase in labor costs force employers in marginal profit industries to become creative with benefit packages, job security and full-time employment levels? Will foodservice be forced to reduce its total work force? In an industry where benefits and wages are already behind the national average, what recourse will the foodservice industry have when the wage rate climbs to $4.25 in 1991? Are you ready for the $5 lunch?

Karol Holt, Food For Thought Inc., an institutional foodservice consulting firm, Louisville, Ky.

ATTENTION OPERATORS: *R&I* Forum represents the views of its contributors, not necessarily those of the magazine. We welcome your comments. Write to: The Editor, *Restaurants & Institutions*, 1350 E. Touhy Ave., P.O. Box 5080, Des Plaines, Ill. 60017-5080. Or fax your letter to (708) 635-6856.

■ EXPANSION PLANS

EUROPE: The New Foreign Market

Favorable demographics and economic implications of 1992 lure fast-food chains to the EC's 12 member countries.

Now that American fast-food companies have a firm foothold in Japan and other Pacific Rim countries, chains are searching for the next hot foreign market.

By all indications, that market is Europe, including the United Kingdom. More than half of the 649 units McDonald's opened last year are in Europe. Burger King quickened its expansion in West Germany, Spain and France last year—Europe now holds 220, or 32%, of the burger chain's 685 international units. Sbarro has inked a U.K. franchise agreement with Trusthouse Forte, and Whitbread PLC, the British brewery, will open T.G.I. Friday's restaurants in England. Disney is expected to open Euro Disneyland near Paris in 1992.

What's behind the rise of Europe as a popular destination for chains? First, American businesses in general—not just fast food—are beginning to realize Europe's potential as a lucrative market. The European Community—Belgium, Denmark, France, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain, the United Kingdom and West Germany—has a population of 320 million, vs. the U.S. population of 250 million, and boasts a gross national product of $4 trillion, compared to the United States' $5.2 trillion.

And the implications of 1992—the year trade barriers among the 12 countries are scheduled to begin to break down—cannot be ignored. Consolidated purchasing and manufacturing will simplify doing business in Europe—McDonald's, for example, says it will be able to consolidate its 14 meat distribution centers on the continent into one or two. Efficiencies in television and radio advertising will foster greater travel among the 12 countries, creating a wealth of new patrons for fast food.

Another group of new patrons will be women, more of whom are expected to enter the workplace. "The trends that are taking place internationally, and especially in Western markets such as Europe, are very similar to what happened in the last decade here in the U.S.," says Stephen Bishopp, chief financial officer of PepsiCo Food Service International. "The demographics are changing more toward food away from home. Home life is changing, and a meal at a Taco Bell or Pizza Hut is becoming part of the daily expectations of families."

Another factor playing in Europe's favor is the unprecedented change taking place in the Eastern Bloc countries that have begun to benefit from the Soviet policy of restructuring, or *perestroika*. Although the nations of Western Europe, with their proven track records, hard currency and stable economies, probably will continue to draw the lion's share of U.S. interest for years to come, industry watchers say that someday, investment in Eastern European countries might yield even larger returns.

"Obviously, Eastern Europe is opening up now, and you can see by the kinds of volumes McDonald's is doing, people are hungry for these Western fast-food concepts," says Donald Fertman, director of franchise sales for Subway. "Eastern Europe is definitely 'the' place to look toward."

The ultra-competitive domestic market gives fast-food chains yet another reason to set sights outside the United States. Research done by Shearson Lehman Hutton, the New York investment house, shows that domestic sales are growing about 7% a year. Overseas, foodservice growth is jumping 15% a year. "The U.S. restaurant market isn't saturated yet, but it certainly is getting to that point," remarks Louis Franson, general manager of franchise development for Arby's International.

TRAVEL PLANS

American chains with the greatest overseas presence also are the strong-

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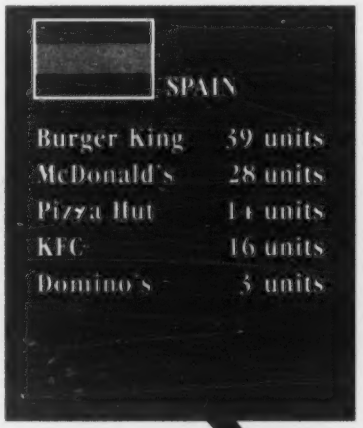

est here. McDonald's is the best example: 2,892 of the burger chain's 11,000-odd restaurants are located outside the United States. Burger King, owned by London-based Grand Metropolitan PLC, has 685 international units, and purchased the 381-unit Wimpy chain last year as part of a plan to push that count even higher.

With those statistics in mind, nonburger chains are making an even bigger push overseas. "We think there's a great, great potential there," says William Copeland, executive vice president of franchise development for A. Copeland Enterprises. "They have almost one-and-a-half times the population of the U.S., and they have very little fast food over there, with the exception of McDonald's. . . . They have very little chicken at all."

Popeyes is negotiating with a prospective franchisee to develop units in the United Kingdom, West Germany, Spain, Belgium and France, and has secured a contract to build 19 Popeyes units on overseas military installations; about 14 of the units will be located in Europe. The first two units are planned for bases in Germany, says Copeland. Although Copeland operates both Popeyes and Church's chicken, the European stores will carry the Popeyes name. Popeyes will soon appoint a vice president to handle international affairs, Copeland adds.

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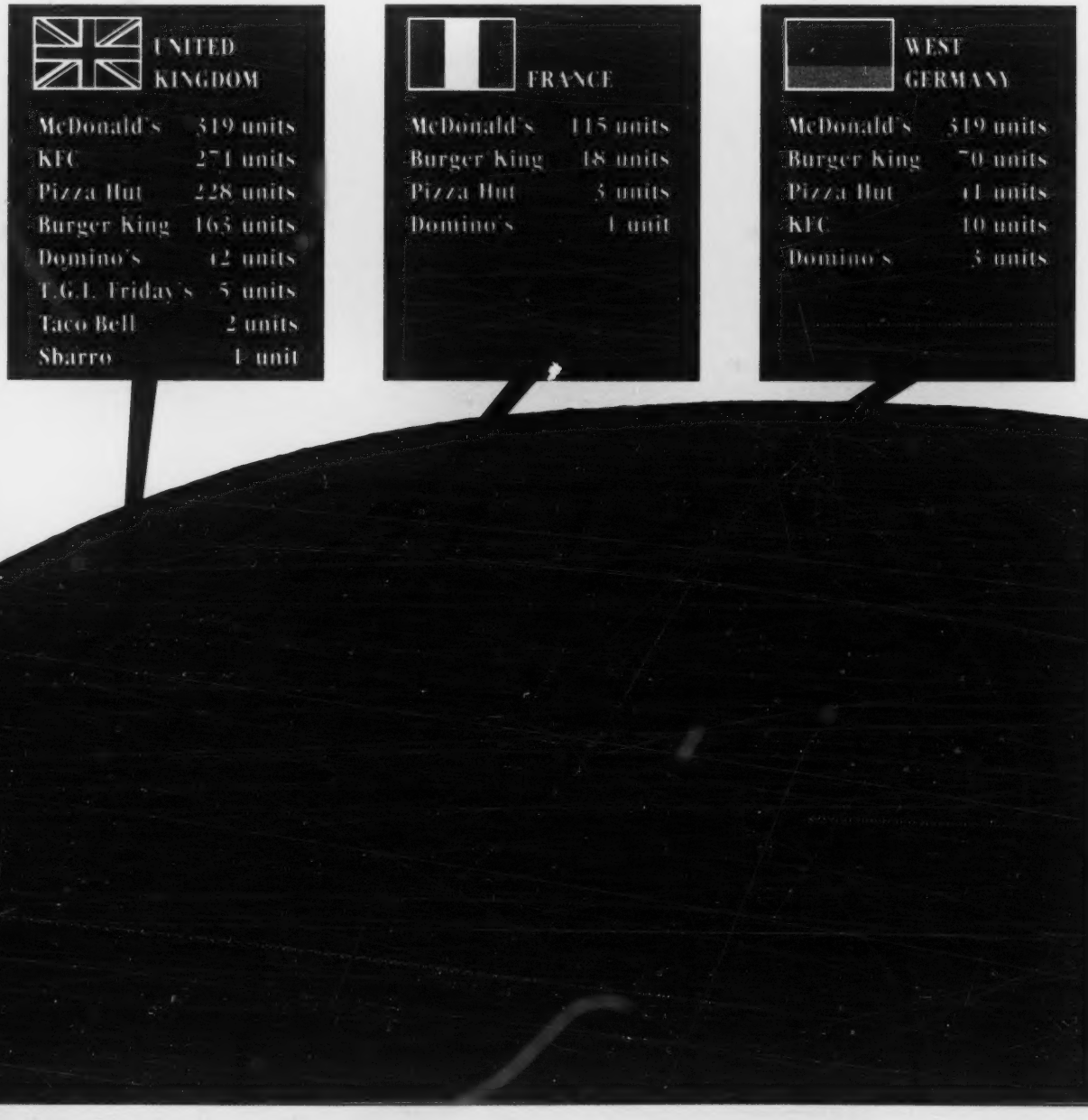

FOREIGN MARKETS

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Arby's, which has 2,100 sandwich outlets in the United States and firm development arrangements in Japan and Taiwan, also plans to open in Europe. The chain is conducting product research in the United Kingdom and will initiate similar testing later this year in West Germany. Arby's also is in discussions with prospective franchisees in Spain, France, Hungary and Poland, Franson says.

Two PepsiCo concepts, Pizza Hut and Kentucky Fried Chicken, are mapping aggressive plans for expansion. Kentucky Fried Chicken—with 3,000 international units, fast-food's best-traveled chain—has about 330 restaurants in Europe, and 270 of those are in the United Kingdom.

Because the majority of its overseas units are located along the Pacific Rim, KFC believes Europe affords the greatest opportunity for new growth. According to Gregg Reynolds, vice president of public affairs for the chicken chain, the company might double its overseas presence during this decade, with much of that growth coming from Europe. Reynolds says France, Spain and Germany are the most likely countries for large-scale expansion.

At PepsiCo Food Service International, the division that directs international development for Pizza Hut and Taco Bell, overseas operations have grown at a compounded annual rate of about 26%—more than three times Pizza Hut's domestic unit growth rate. During this time, international sales have advanced more than 40%, vs. domestic sales growth of about 13%.

> Efficiencies in TV and radio advertising will foster greater travel among the 12 European Community countries, creating a hoard of new patrons for fast food.

Pizza Hut, also with about 300 European units, two-thirds of which are in the United Kingdom, recently added Greece to its list of foreign markets.

Meanwhile, PepsiCo has charted a much more deliberate course for Taco Bell, which has only a handful of units overseas and is struggling to gain acceptance, says a PepsiCo spokeswoman. Most countries outside North America have had little exposure to Mexican food, she explains, and educating people about new foods takes time.

Like Taco Bell, several other chains have just begun to launch international operations:

☐ T.G.I. Friday's plans to open its first West German unit in Essen in the first quarter of 1991. The company's franchisee, Whitbread & Co. PLC, already operates five Friday's restaurants in the United Kingdom.

☐ Subway, the fast-growing 4,400-unit sandwich chain, has sold its first franchise for Ireland, is trying to open in Hungary, and has appointed a development agent for France.

☐ Nathan's Famous, the 51-unit hot-dog chain, is in discussions to open units in England, Switzerland and Italy.

☐ Sbarro, the Italian cafeteria chain, opened its first in the U.K. in March as part of a two-unit limited agreement with Trusthouse Forte, the hotel giant and KFC's British franchisee as well. "In terms of international activity, we are very gradually sticking our toes in the water," says Phil Speicher, chief financial officer at Sbarro.

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RUSSIA: WORTH THE TROUBLE?

In the Soviet Union, only a handful of restaurant companies have shown interest in setting up shop, despite the prospect of serving a country with almost 300 million prospective customers and little competition from local restaurants.

One of those that did, and is now wondering if it was worth it, is Nathan's Famous, the hot-dog chain that opened a restaurant in Moscow in October. The chain now is deciding whether to open more stores there, according to Carl Paley, vice president of franchise development.

The problem, Paley says, is getting profits out. "From a public relations standpoint, it has been very valuable and a very viable opportunity for us to expose a lot of people to the product," he explains. "But from a P&L standpoint, it has been a problem."

Pizza Hut, which will open two restaurants in Moscow in late summer, plans to generate some hard currency through its Soviet units by selling pizza to tourists and others with hard currency. It will use that money to pay for items that are not available in the Soviet Union, says Stephen Bishopp, chief financial officer of PepsiCo Food Service International.

Bishopp also says that the franchise agreement that its joint venture, signed with the City of Moscow Catering, contains provisions for taking fees and profits out. Some of the profits will be reinvested in the market, he says.

McDonald's, whose 700-seat Soviet restaurant serves 30,000 people daily, is also reportedly channeling a large percentage of its proceeds into development of its other scheduled restaurants. While McDonald's investment in Eastern Europe and the Soviet Union might seem like a bit of a gamble, the world can be sure that as the walls come down, Golden Arches will go up.

In April, PepsiCo International demonstrated one more way to get profits out of a country. For years, Pepsi-Cola has traded soft-drink syrup to the Soviet government for a Soviet brand of vodka. The vodka is distributed in the United States for cash, which pays for the syrup given to the Soviets. In April, PepsiCo took the art of the deal one step further by increasing its shipments of syrup in return for more vodka and 10 ships.

FOREIGN MARKETS

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CHAIN CHECKPOINTS

Of course, some formidable roadblocks still stand in the way of expanding into Eastern Europe, according to franchisors. Even in the nations of the European Community, there are challenges to meet and adjustments to make.

Chains say the biggest roadblock is finding the right local operator, regardless of the market or the type of agreement they're shopping for.

"The biggest issue facing us is finding the right partner," says Arby's Franson. "We look for four things: financing; existing management structure; restaurant experience; and the fourth thing, which is really an intangible, is the chemistry between Arby's and the potential partner, because if it doesn't work in the beginning, it's not going to work later."

KFC's Reynolds concurs. In order to be successful in a foreign land, he says, chains must find a partner that is large and well-capitalized, committed to rapid growth and adept at working with the local laws and customs.

Above all, "the most favorable quality a partner can have is real estate connections," says Subway's Fertman.

In some countries, especially those of the Eastern Bloc, problems with currency also go with the territory, chain executives say. The currency of these countries, such as the Soviet Union's ruble or the Polish zloty, is "soft," and cannot be exchanged for hard currency such as the dollar.

The biggest roadblock to European expansion is finding the right local operator, regardless of the market or the type of agreement chains are shopping for.

But even in those countries where chains can get their profits out, the earnings sometimes are subject to the country's tax system. To get around this, chains use barter, or trade for goods that can be sold outside the country for hard currency.

Sometimes, the difference between success and failure abroad is just a matter of fine-tuning the menu to suit the tastes, culture and customs of the local clientele. Even so, most chain executives say that they try to limit menu changes to side items and toppings. For instance, McDonald's offers beer and wine at certain European locations. Pizza Hut's German outlets offer a popular tuna topping and are testing sauerkraut pizza topping.

Chains also have to make adjustments to buildings. In Germany, for instance, the preference for finger foods is so strong that Pizza Hut built walk-up windows through which single slices of pizza are sold.

Occasionally, alterations made overseas spark ideas that make business better back in the states. Kentucky Fried Chicken, for example, might begin building huge restaurants, like some of those it has in high-traffic European cities, near larger American tourist attractions. The express kiosk units Pizza Hut uses in U.S. airports were born as pub kiosks in the United Kingdom. A German franchisee created McDonald's Egg McMuffin.

And that, chain executives say, is the kind of interaction they hope will continue as foodservice, like other industries, grows global. ***—Rajan Chaudry***

UNCERTAINTY REIGNS IN CHINA

Europe's population—320 million—and economic power—a GNP of $4 trillion—make it an attractive target market for chains. But if size is an issue, why aren't more chains trying to open in China—home of more than two billion people? Indeed, the country with the largest population in the world sports only three American fast-food chains, and all three belong to Kentucky Fried Chicken.

The biggest block to expanding in China is its economy, industry executives say. Little more than a year ago, China's problem was runaway growth, but after government troops crushed a democracy movement in Beijing's Tiananmen Square, the economy coughed and wheezed to a halt.

Louis Franson, vice president and general manager of Arby's International, says the troubles in China have killed the interest he once had in entering that country. "With the economic problems China is having and the political issues over there, we really don't have any interest at this time," he says.

Gregg Reynolds, KFC Corp.'s vice president of public affairs, acknowledges that China's economic troubles are hurting the chain's Beijing units. The restaurant on Tiananmen Square was closed for more than a month during last year's student uprising—for a while, soldiers used it as barracks.

Reynolds also says that the chicken chain is prepared to wait out the storm. "As far as China is concerned, we really have just been reinvesting the money in the market there, but given the instability, it's very difficult to know what the future holds," he says.

The uncertainty factor hasn't stopped Fast Track, a small, double-drive-thru burger chain, from wanting to open in China. The chain spent six months negotiating for a site abutting the Kentucky Fried Chicken outlet on Tiananmen Square, beating out McDonald's, Burger King and Wendy's in the process, says Joe Farnsworth, president of the franchise group that will open the outlet in China.

Farnsworth guesses that the burger giants might have let up because of the instability in China. "We're smaller, and the brand-name recognition isn't as strong," he admits. "But if something goes wrong, we also have a lot less at stake than McDonald's would."

ACTION EXPRESS

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